Resources -- In the Event of My Death

Biographical Information

Full Legal Name: _____   Social Security Number: _____

Date and Place of Birth: _____   Driver's License Number: _____

Address: _____

Military Service (Branch and Dates): _____

Spouse's Name (Current): _____   Spouse's Date of Birth: _____

Spouse's Date and Place of Birth: _____

Former Spouse's Name: _____   Date of ☐Divorce or ☐Death: _____

Former Spouse's Social Security Number: _____   Former Spouse's Address: _____

Children (Name, Date of Birth, Location of Birth, Address): _____

_____

_____

Who to Contact

Fairfax County Retirement Agency: 703-279-8200 or 1-800-333-1633   County Life Insurance: 703-324-3437

Other Retirement Plan: _____   Spouse's Retirement Plan: _____

Life Insurance: _____   Health Insurance: _____

Insurance on Credit Card(s)/Credit Union or Bank Accounts: _____

_____

Other Insurance (Auto, Home, Accident, Long-Term Care, etc.): _____

_____

_____

Attorney: _____   Accountant: _____

Banker: _____   Deferred Compensation: 703-324-3374 (County)

Doctor(s): _____   Deferred Comp Vendor: _____

Employer: _____   Executor of Estate: _____

Funeral Director: _____   Landlord (Mortgage Company): _____

Minister/Rabbi: _____   Social Security: (800) 772-1213

Stockbroker: _____   Fraternal Organizations/Clubs: _____

FAMILY MEMBERS AND FRIENDS WHO SHOULD BE CONTACTED: _____

_____

_____

_____

_____

Where My Valuable Papers are Located

Original of My Will (and Spouse's Will): _____

Powers of Attorney/Advanced Medical Directive: _____

Burial Instructions: _____

Trust Agreements: _____

Life, Health, Homeowners, Auto and Long-Term Care Insurance Policies: _____

_____

Birth Certificates (for you, your spouse and children): _____

Marriage Certificates: _____

Passport: _____

Safe Combination: _____

Safe Deposit Box (location of box and key): _____

Checking and Savings Account Information: _____

_____

List of Credit Cards and Lines of Credit: _____

_____

_____

List of Debts: _____

_____

List of Stored and Loaned Items: _____

_____

Titles to Vehicles: _____

Brokerage Account Records: _____

Divorce Papers: _____

Citizenship Papers: _____

Adoption Records: _____

Prenuptial/Postnuptial Agreements: _____

Military Discharge Papers: _____

Deeds, Mortgage, Title Insurance, Surveys: _____

Original Purchase Price of Real Estate, Original Purchase Documents: _____

Business Records: _____

Tax Records: _____

Receipts: _____

Leases: _____

Stamps/Coins or Other Collections: _____

Hidden Valuables: _____

Other: _____

_____

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